Quick Reference Guide 1
Skype For Business
Using the Application

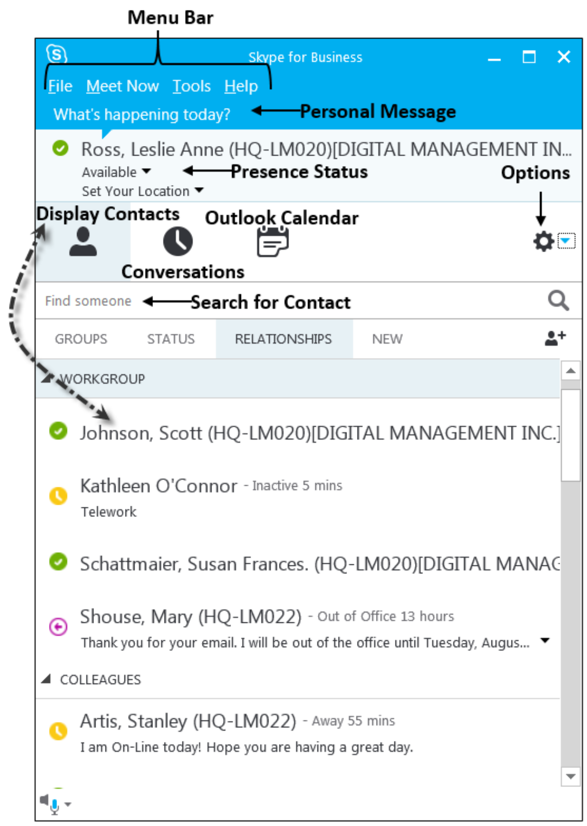
Skype For Business is the latest instant messaging (IM) client from Microsoft and is the upgrade to Microsoft Lync 2013.

Skype For Business Application Window

- **Menu Bar**: Not displayed by default. Click **Options** and select **Show Menu Bar** from the drop-down list.
- **Personal Message:** Enter a personal note to be shared with others logged into Skype For Business. If the *Automatic Reply* (Out of Office) message is enabled in Outlook, it will be displayed as the Personal Message.
- **Presence Status**: Users indicate their current status as Available, Busy, Do Not Disturb, Be Right Back, Off Work, or Appear Away.

More information on Presence is available in the Skype For Business 2013 QRG 3 – Presence and Privacy Relationships. The card is posted on the ITCD Web site http://itcd.hq.nasa.gov/ctc.

  - Click the **Presence Status** drop-down arrow to display the options.
  - Click to select the desired status. The colored circle to the left of the photo frame changes based on your status.
- The status adjusts to match your availability in Outlook. If you are in a meeting in your Outlook calendar, the status adjusts to "In a Meeting."
- **Options**: The Skype for Business Options are discussed in detail in the *Skye For Business QRG 4 –Options*. The card is posted on the *ITCD Web site* http://itcd.hq.nasa.gov/ctc.



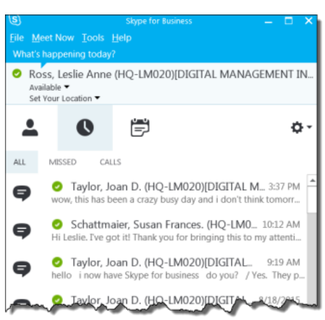
Views

Contacts View (shown above)

In the application default window, the Contacts view displays **Groups** with contact cards added by the user. Each group has special privacy rights. Contacts have one of five possible privacy relationships: **Colleagues**, **External contacts**, **Workgroup**, or **Friends and Family**. Each has preset privacy access. Please see *Skype For Business 2013 QRG 3 – Presence and Privacy Relationships* for more information. The card is posted on the *ITCD Web site http://itcd.hq.nasa.gov/ctc.*

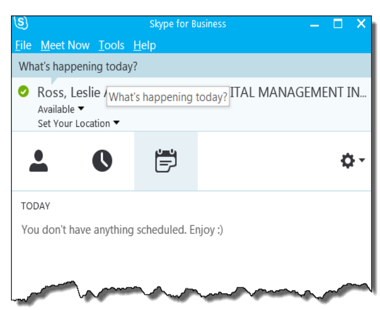
Conversations View shown right)

This view displays Skype For Business IM messages and calls history. You can review **All** (combined IM and Calls), **Missed** IMs, and **Calls**.



Meetings View (shown right)

This view displays today's meetings on your calendar in Outlook. This display is read only. To access the meetings, open Outlook and display your calendar.

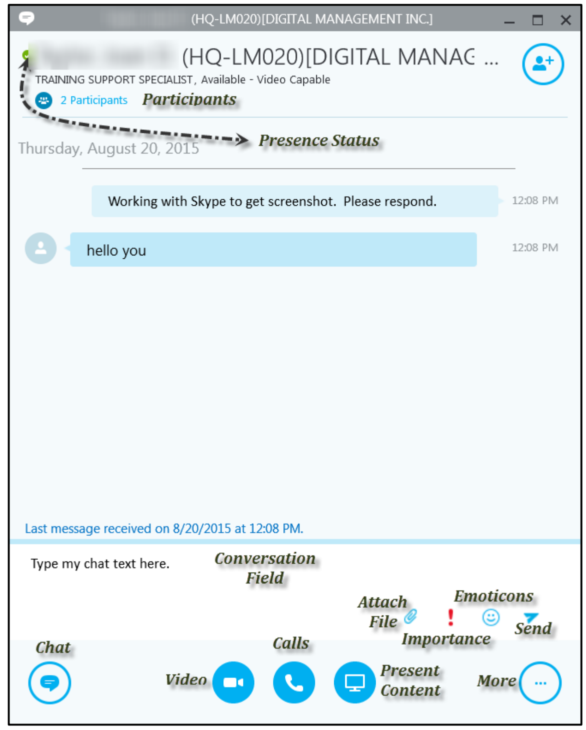


For software training, contact the Computer Training Center (CTC) at 358-1111 or visit the CTC Web site at http://itcd.hq.nasa.gov/ctc.

Although you can store history in the Convesation History folder in Outlook, it is not recommended as the messages will be included in the size of your Outlook mailbox and could affect Outlook functionality.

Instant Messaging ("IM")

IM with One Person



1. Click the **Search** field and type the first or last name of the individual you wish to IM.
2. From the search result, double-click on the contact name. An *IM Chat* window will open (shown right).

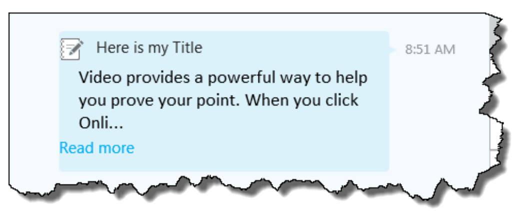
You can change to a Skype For Business call, desktop sharing, video (if enabled) or meeting by inviting others.

3. Type your message in the **Conversation** field and press **ENTER** or click the **Send** icon . The IM is sent to the recipient(s).

- Click the **Participants** icon to display the Participants list.
- In the *Quick* bar, click the icons for **Chat** , **Video** , **Call** , and **Present Content** .
- Use the **Attach File** icon to select a file to send to the participants.
- Use the **Emoticon** icon to add graphics to express your emotions.
- Mark high priority by clicking the **Importance** icon .

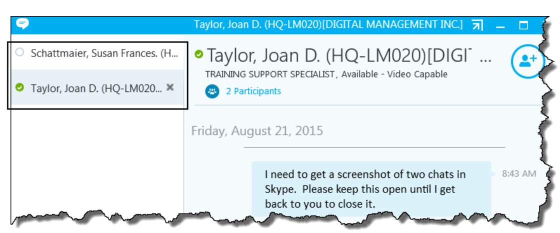
You can right-click in the chat to access a shortcut menu. From the menu, you can Undo, Cut, Copy, Paste, Paste Formatting, Delete, Select All, Change Font, Mark High Priority, change reading order to Right-to-Left Reading Order, or Post as Long Message.

FYI … Long messages are automatically broken into sections that display with a title and a small amount of text. The remainder of the message displays collapsed and can be viewed by clicking Read more (shown right). You can format your text as a long message by right-clicking in the ***Conversation*** *field and selecting "****Post as a Long Message****." Enter a title for each section and enter the text.*

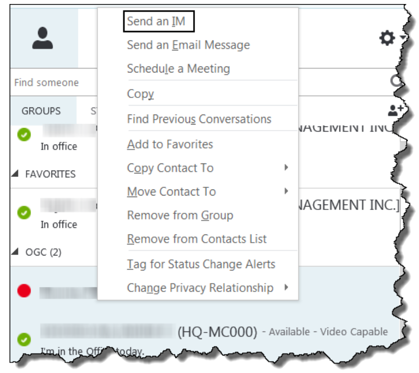


- **Tabbed Chat** provides alerts and notifications so you do not miss important messages (shown right).

4. Click the **"X"** in the upper right corner to close the chat.

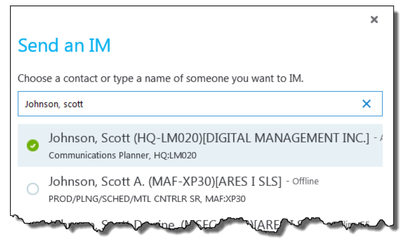


IM with Multiple People



1. **Shift** + **click** the first and last contact card for contiguous (side by side) items and **control** + **click** each contact card for non-contiguous items.
2. Right-click and select **Send an IM** (shown right).
3. Type your message in the **Conversation** field and press **ENTER**. The IM is sent to the recipient.
4. Click the **"X"** in the upper right corner to close the chat.

Add Participants

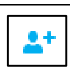


1. From an existing chat, click  the **Invite More People** icon next to the participant's name. The *Send an IM* dialog box will display (shown right).
2. Search for the desired contact and double-click the contact card displayed in the search result or double-click to select from the list provided.
3. Type a message in the **Conversation** field and press **ENTER**. The IM is sent to the participants.
4. Click the **"X"** in the upper right corner to close the chat.

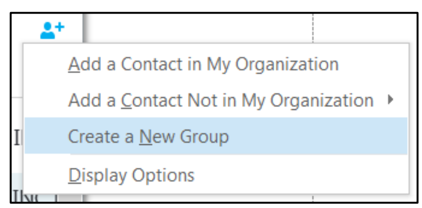
IM with a Group

1. First create the group and then add the members (steps are outlined in the sections entitled "*Create a Group*" and "*Add Members to a Group*" on page 3).
2. Right-click on the group name and select **Send an IM.**
3. Type a message in the **Conversation** field and press **ENTER**. The IM is sent to the group members.
4. Click the **"X"** in the upper right corner to close the chat.

Create a Group

1. Click  the **Add contact icon | Create a New Group**. The cursor moves to the *Contact Groups list* view and adds a group entitled "**New Group.**"

You can also hover your mouse on an existing group and right-click to display a shortcut menu. Click on ***Create New Group****. A new group is added named "****New Group.****"*



2. Click on the **group** name and type the desired name in the field provided. Press **ENTER** to accept the name.
3. Right-click on the **Group** name to do the following: **Send an IM**, **Send an Email Message**, **Schedule a Meeting**, **Move Group Up**, **Move Group Down**, **Rename Group**, or **Delete Group**.

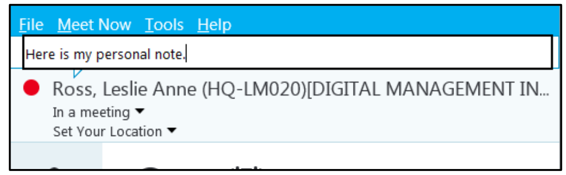
Add Members to a Group

Drag and drop contact cards from other groups or **search** for the contact card name and **drag and drop** from the search result to the appropriate group. To search, do the following:

1. Click the **Search** field and type the first or last name of the individual you wish to add.
2. From the search result, **drag and drop** the contact card on a group. **OR**

   You can also right-click on the contact card to display a shortcut menu. Select **Add to Contacts List** and select the group to which you will add the contact.

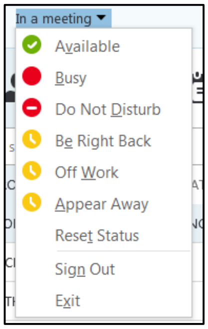
Personal Note



The **Note** box displays above your name in the Skype For Business application window. Status indicators are pre-set so use the Note box to give others more information about your status.

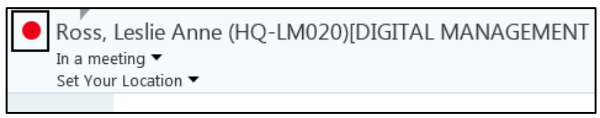
1. Click into the **Note** box and type a note to display when others access your contact card in their Skype For Business application window.
2. To delete, click into the field and delete the text. The default "***What's happening today***?" will display.

When enabling your Automatic Reply (Out of Office) in Outlook, that message displays as your personal message in Skype For Business. If you change the personal note through Skype For Business while the automatic reply is enabled in Outlook, it will only affect Skype For Business.



Check Contact Availability

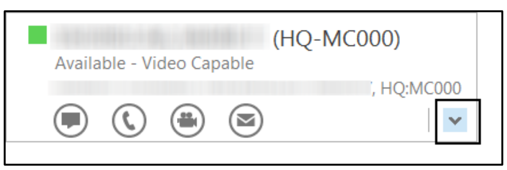
Beside the contact name, you will see a colored circle which identifies the user's **Presence status** (according to those listed in the graphic to the left). Your **Presence Status** displays underneath your contact name (shown below). To change your status, click the drop-down arrow (shown left) and click to select the appropriate status from the drop-down list.



For more information on User Presence, please refer to the Skype For Business QRG 3 – Presence and Privacy Relationships.

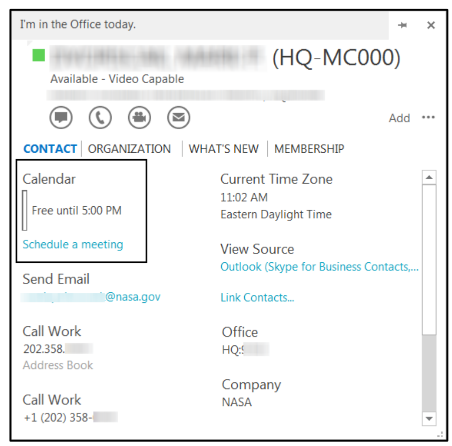
Check a Colleague's Outlook Calendar

1. Double-click the contact card as if to start a chat.
2. Hover mouse on the contact's name at the top. A shortcut menu displays (shown below).

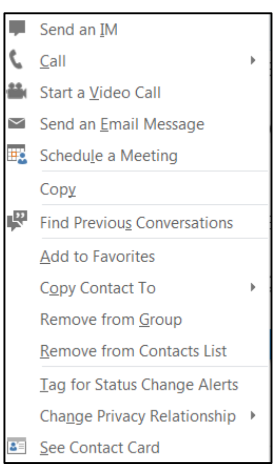


3. From shortcut menu, click  the drop-down arrow to open the Contact Card. The calendar will display (shown right).

You can also send the user an email from this view.



Shortcut Menu Options



Right-click on a contact in a group or search result and the Shortcut menu will display (shown left). From that menu, you can do the following:

- **Send an IM**, **Call**, **Start a Video call**, **Send an Email Message** or **Schedule a Skype For Business Meeting** (in Outlook).
- **Copy** the contact email address, **Copy Contact To** | group name, or **Add to Favorites** to keep track of your most frequently contacted list.
- **Find Previous Conversations** to search the Outlook Conversation History folder (best practice: do not enable saving conversation history in Outlook).
- **Tag for Status Change Alerts** to receive an alert when the status changes for this contact.
- Change Privacy Relationship to **Friends and Family**, **Workgroup**, **Colleagues**, **External Contacts, Blocked Contacts,** or **Auto-assign Relationships**.
- **See Contact Card** to display more information on the Contact.

Skype For Business Calls

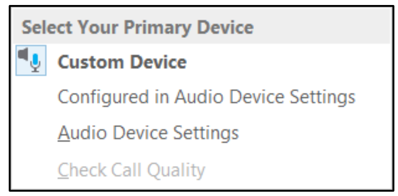
You can call a single person in the NASA directory to have a two-way conversation with a colleague. Skype for Business does not have the ability to make an outside call. If you want to use Skype for Business to make a call, the only option is a Skype for Business to Skype for Business call with one other NOMAD user. To call any other number listed you will need to use another device.

IMPORTANT: The capability to use Skype For Business to call multiple contacts is not available.

Set up Audio Device

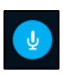
Before using the application to make calls, you need to set up your audio device. You can use your computer's microphone and speakers but that does not provide privacy in the work environment. **Best practice**: use an external headset with microphone.

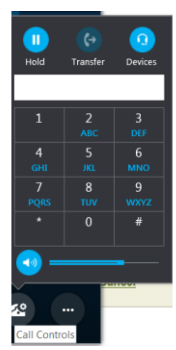
If you already have a headset with microphone to use with SoftPhone or Jabber, you can use the same headset. If you do not have a headset with a microphone, please work with your IT POC to order one from PCMall.



1. In the lower left corner of the Skype For Business application window, click **Select Your Primary Device**  (shown right).
2. Click to select the device to be used for audio calls.
3. Click **Audio Device settings** to open the Skype For Business Options for Audio Devices.
4. Customize your device by dragging the sliders to adjust the speakers, microphone and ringer.

Place a Skype For Business Call

1. Double-click to select the contact card from a group or search result. The Chat window displays.
2. Click  the **Phone** icon on the *Quick Skype For Business* bar. The selected person will receive a pop window alerting them of the call. Once the person accepts the call, do any of the following:
   a. Click  the **Hang up** icon to end the call.
   b. Click  the **Phone/Microphone** icon at the bottom of the window to mute/unmute. When muted, the icon shows a red line across the microphone.
   c. Hover on  the **Phone/Microphone** icon and do the following:
      (i) Click on **Hold Call** or press **Control + Shift + H** to place the call on hold.
      (ii) Click **Transfer** to transfer the call.
      (iii) Click Devices to adjust the audio device.



Answer a Skype for Business Call

When someone calls you, an alert appears on your screen.

1. To answer the call, click anywhere on the contact's picture display area.
2. Click **Ignore** to reject the call and send to voicemail.
3. Click **Options** to perform these actions:
   a. **Send the call** to Voice Mail.
   b. Click **Mobile** or **Home** to redirect the call.
   c. **Reply by IM** instead of audio or video.
   d. Set to **Do Not Disturb** to reject the call and avoid other calls.

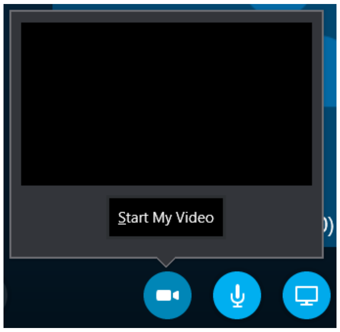
Video

You can use the video camera in your computer for a **peer to peer (two-way)** video call. Be sure you have a headset attached for the audio portion of the call. **IMPORTANT**: Multi-party video calls are not supported at NASA.

If your video camera is not configured, please contact the Enterprise Service Desk (ESD) at 202.358.4357 or via the Web site https://esd.nasa.gov/secure/main.cfm.

Video Calls

1. Click  the **Camera** icon to start a Video call.



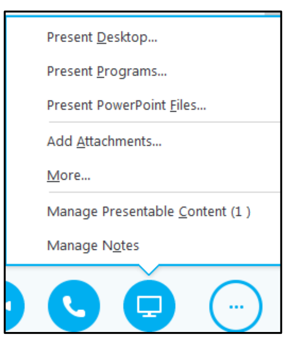
2. Click **Start My Video**. The two-way video window displays with the other party's video larger and your video smaller in the corner.

Desktop and Application Sharing

Users can start or join an ad-hoc Skype For Business Meeting easily with up to 15 participants with just a few clicks in Skype For Business or in Office applications. Skype For Business virtual meetings enable users to escalate simple instant messaging conversations or email conversations to PC-based, multi-party meetings with shared desktops, applications, and documents.

Desktop Sharing

1. Click the **Monitor** icon on the *Quick Skype For Business* bar to start a presentation. The *Present* menu displays (shown below).



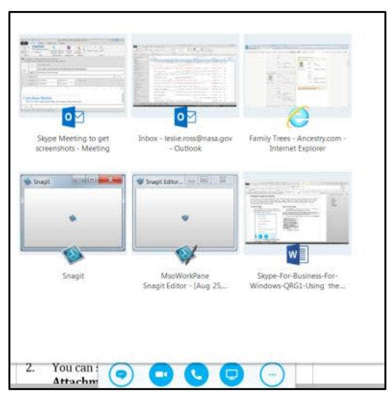
2. You can share your **Desktop,** a **Program, Add Attachments,** access **My Notes, Manage Presentable Content** or **Manage Notes**. Click to select what you would like to present.

*When you share a monitor, Skype For Business will display the message "**People will be able to see everything on the monitor you chose.**"*

3. Click **OK** to continue.

Application Sharing

1. Click **Present Program** to share an open application. The *Present Program* dialog box displays (shown below).



Anytime you want to share an application, you must have the application already open before you can share it.

2. Click the specific application to be shared and click **Present.**

*When you share an application, Skype For Business will display a message "**People will be able to see all open windows of the program you chose.**"*

3. Click **OK** to continue.

Give and Take Control when Sharing

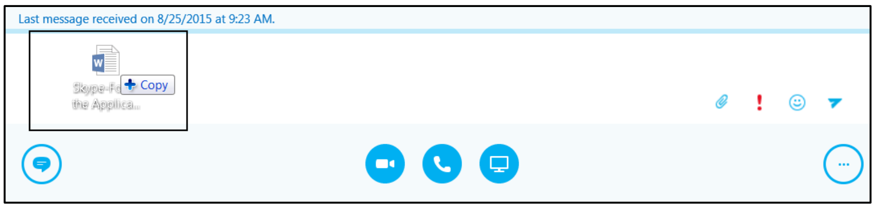
You can give control to another meeting participant by clicking **Give Control** on the *Sharing* Toolbar (shown below) Once you give control to another participant, they can move the mouse in the presentation window, click on windows they have access to and type in applications or documents that you are sharing with them.

1. On the *Sharing* toolbar, click **Give Control** (shown above). A drop-down list displays with a list of Attendees.

2. Select the Attendees to whom you wish to give control. Skype For Business sends a notification to that Attendee.
3. To take back control, click G**ive Control** and then click **Take Back Control**.

File Transfer

1. With the **IM** chat open, **click and drag** a file from its stored location into the text field (shown below).



2. Press **ENTER** to send the file.

View Received Files

1. Click **File** | **View Received files**. Skype For Business launches a Windows Explorer window opened to the default folder.
2. Click on the desired file to open.

*If you have not received a file yet in a chat, the default folder “**My Received Files**” does not exist. The system is looking for the folder c:\users\[username]\Documents\My Received Files.” This folder is created when you receive your first file transfer and received files store in this location until moved or deleted. If you change the location File Transfer Save to in Options, when you click on File | View Received Files, Skype For Business will return an error “something happened to your file transfer folder. Please pick a new folder in Options under File Saving.” Best Practice: do not change the file transfer location.*

Sign Out/Close/Exit

Sign Out

If you **Sign Out**, the application remains open but your account is not available to other users.

- Click **File** on the *Menu bar* (if displayed) | **Sign Out**.
  OR
- Click **Options drop-down arrow** | **File** | **Sign Out**.
  OR
- Click the **Status drop-down arrow** | **Sign Out**. The application window moves to the **Sign in** screen.

*The Skype For Business application remains open and the icon remains on the Windows Taskbar until you **Exit**.*

Close

Using close will only close the application window. You are still logged in. This minimizes the application window to the Windows Taskbar.

- Click **File** on the *Menu bar* (if displayed) | **Close**. OR
- Click **Options** drop-down arrow | **File** | **Close**.

Exit

Exit closes the application window and signs you out of the application.

- Click the **Status drop-down arrow** and click **Exit**.
  OR
- Click **File** on the *Menu bar* (if enabled) | **Exit**.